

The following steps must be followed each time a user does a 'Person Search' from the Main Menu page in Oregon ACCESS. Searching in Oregon ACCESS utilizes the Client Index (CI) database. The CI database is the Department's official person registry and contains more client records than the Oregon ACCESS database. If the person is not found in CI, the user will then be able to search the full Oregon ACCESS database.

These steps are required in order to reduce the number of duplicate person records that are created. A new record should only be created after performing a complete search.

**When searching, use the following steps:**

- When searching by SSN, if the SSN is found, check to be sure it is the correct person;

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
BECK	JOHN	E P	175-31-8641	AU500030	11/23/1935

- When searching by name, use the first three letters of the first name and the first three letters of the last name (i.e. BEC, JOH). This will display a list of potential matches, even if the name is misspelled;

**PERSON SEARCH**

Person Search

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
BEC	JOH		- -		00/00/0000

Sounds like: ☐ (CI Only) Search Status: CI Search in CI Clear

Person 1 of 200 Prev

Last Name	First Name	MI Typ	SSN	Prime Nmbr	DOB	BrCd
BECK	JOHN	E P	175-31-8641	AU500030	11/23/1935	1717

- If the person is not in the list, try using the date of birth (DOB) in addition to the name as described above;

**PERSON SEARCH**

Person Search

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
BEC	JOH		- -		11/23/1935

Sounds like: ☐ (CI Only) Search Status: CI Search in CI Clear

Person 1 of 200 Prev

Last Name	First Name	MI Typ	SSN	Prime Nmbr	DOB	BrCd
BECK	JOHN	E P	175-31-8641	AU500030	11/23/1935	1717

- If the person is found, but has incorrect information, such as a misspelled name, incorrect SSN, or incorrect DOB, do not create a new record. The incorrect information can be corrected much easier and faster than merging duplicate records;
- If the person is not found, click 'No Match -> Search in OA' to search in Oregon ACCESS.

**PERSON SEARCH**

Person Search

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
BECKHAM	DI	P	- -	KB900N4G	02/04/1974

View Person No Match -> Search in OA Not Found in OA -> Create Person

Download/Reg from CI Add to Existing Case/ RA

- The 'Search Status' field indicates which system the currently displayed results are from. This will display as:
  - 'CI' when CI results are displayed;
  - 'OA' when OA records are displayed; and,
  - 'Idle' when the search has not been initiated.

Person Search

Last Name	First Name	M.I.	SSN	Prime Nbr	DOB
SPD	NINE		--		00/00/0000

Sounds like: ☐ (CI Only)      Search Status: **CI**      Search in CI      Clear

- If the person is still not found, create a new record.

## Person search scenarios with a description of how Oregon ACCESS will route users:

- Search scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person.
- Search scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.
- Search scenario #3: Person is not found in CI.

**Search Scenario #1:** Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person. *(This means that there is an Oregon ACCESS record that has the same CI number as the CI record you selected. This connection is made during the Oregon ACCESS registration process).*

In this scenario, the **View Person** button will be enabled when users click on the person on the search return screen. The availability of this button indicates that there is a registered Oregon ACCESS record associated with the highlighted CI record.

**Person Search**

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	NINE		--		00/00/0000

Sounds like: ☐ (CI Only) Search Status:

Person 1 of 200

Last Name	First Name	MI	Type	SSN	Prime Nmbr	DOB
SPD	NINE	M	P	--	TIA00L1K	05/01/1950
SPD	ONE	M	P	--	TIA00L1C	05/05/1950
SPD	SEVEN	M	P	--	TIA00L1I	05/05/1981
SPD	SIX	A	P	--	TIA00L1H	06/01/1925
SPD	TEN		P	--	TIA00L1L	05/05/1950
SPD	THREE	M	P	--	TIA00L1E	09/01/1920
SPD	TWELVE	M	P	--	TIA00L1P	05/05/1950
SPD	TWO	M	P	--	TIA00L1D	01/01/1950
SPEAKER	ALBERTA	M	P	543-07-5612	DG09770A	08/15/1910
SPEAR	D MARIE		A	565-30-6009	OD500S7W	03/18/1923
SPEAR	MARIE	D	P	565-30-6009	OD500S7W	03/18/1923

When the user clicks on the **View Person** button, they will be taken to the Person Details window for this person. If the user would like to return to the search results window, they may click on the **Person Search** button in the Person Details window.

**Search Scenario #2:** Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.

In this scenario, after users click on the person in the search return list, the user may download the CI record to Oregon ACCESS by clicking on the **Download/Reg from CI** button.

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	EIGHT		- -		00/00/0000

Sounds like: ☐ (CI Only) Search Status:

Person 1 of 200

Last Name	First Name	MI	Type	SSN	Prime Nmbr	DOB
SPD	EIGHT		P	- -	TIA00L1J	04/01/1962
SPD	ELEVEN	M	P	- -	TIA00L1M	04/01/1958
SPD	FIVE		P	- -	TIA00L1G	01/01/1900
SPD	FOUR	M	P	- -	TIA00L1F	07/01/1965
SPD	NINE	M	P	- -	TIA00L1K	05/01/1950
SPD	ONE	M	P	- -	TIA00L1C	05/05/1950
SPD	SEVEN	M	P	- -	TIA00L1I	05/05/1981
SPD	SIX	A	P	- -	TIA00L1H	06/01/1925
SPD	TEN		P	- -	TIA00L1L	05/05/1950
SPD	THREE	M	P	- -	TIA00L1E	09/01/1920
SPD	TWELVE	M	P	- -	TIA00L1P	05/05/1950

When the user clicks on the  button from the CI search results window, the system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	FIVE		- -	TIA00L1G	00/00/0000

Sounds like: ☐ (CI Only) Search Status: OA Search in CI Clear

Person 1 of 1 - Potential OA Matches Prev

Last Name	First Name	MI	SSN	Prime Nmbr	DOB	Status
SPD	FIVE		- -		00/00/0000	Active

View Person No Match -> Search in OA Not Found in OA -> Create Person Next

No Match -> Download Add to Existing Case/ RA

If a match is found among the OA search results, the user may view the record by clicking **View Person**. At that point, the user may register/re-register, as necessary. If no match is found among the Oregon ACCESS search results, the user may click

No Match -> **Download**

and continue with the download process. If the user would like to search again, using different criteria, they may click the **Clear** button, enter the new search criteria, and search again.

### Search Scenario #3: Person is not found in CI.

In this scenario, the user has performed a CI search, but does not find a record that matches the consumer's data.

**PERSON SEARCH**

**Person Search**

Last Name	First Name	M.I.	SSN	Prime Nbr	DOB
BEC	PEG		- -		00/00/0000

Sounds like: ☐ (CI Only)      Search Status:            

Person 1 of 200     

Last Name	First Name	MI	Typ	SSN	Prime Nbr	DOB	BrCd
BECAUSEIAMNOTTHERE	ABSENTFATHER		P	- -	RS10003L	01/01/1992	
BECAUSEIAMNOTTHERE	ABSENTMOTHER		P	- -	RS10003M	01/01/1993	
BECHAME	ROSE	T	P	- -	KT800N3P	07/12/2010	
BECHAME	STEVE	T	A	- -	CE800N7E	06/01/1994	
BECK	CHAD		P	- -	XS900N9A	03/27/2006	
BECK	CHERIE		P	- -	WS900N0Y	08/12/1952	
BECK	JEFF		P	- -	WS900N0X	08/12/1951	
BECK	JOHN	E	P	175-31-8641	AU500030	11/23/1935	1717
BECK	TAYLOR		P	- -	XS900N9B	03/27/2009	
BECKHAM	DAVID	J	P	518-23-1013	NH900N8A	11/22/1975	
BECKHAM	DI		P	- -	KB900N4G	02/04/1974	

The user may click on . The system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

**PERSON SEARCH**

**Person Search**

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
BEC			--		00/00/0000

Sounds like: ☐ (CI Only) Search Status: OA Search in CI Clear

Person 2 of 112 Prev

Last Name	First Name	MI	SSN	Prime Nmbr	DOB	Status	BrCd
BECK	AARON		032-67-9991		00/00/0000	Active	2617
BECK	ANN		--		00/00/0000	Active	3515
BECK	DALE		032-12-3456	KF800J5C	01/01/1920	Inactive	
BECK	GENE		421-42-4211	IB300N3E	12/01/1938	Active	3013
BECK	JOHN	E	175-31-8641	AU500O3O	11/23/1935	Active	1717
BECKER	IDA MAE		--		10/10/1914	Active	2617
BECKER	JOHN	W	541-19-1122	BF800J5A	12/25/1960	Inactive	
BECKY	BILL		543-22-2233	AB400N0A	02/02/1952	Active	3617
BECKY	SAM		542-21-2233	YA400N6X	12/22/1922	Active	3617
BECKY	TERRY		541-23-2233	YA400N6Y	01/02/1960	Active	3617

Next

**View Person** No Match -> Search in OA

**Not Found in OA -> Create Person**

Download/Reg from CI Add to Existing Case/ RA

If the record is found in the OA search results, the user may click **View Person** to go to the Person Details Window. At that point, the user may register/re-register, as necessary.

If the person is not found in the Oregon ACCESS search results, the user may click the **Not Found in OA -> Create Person** button and create an Oregon ACCESS record.

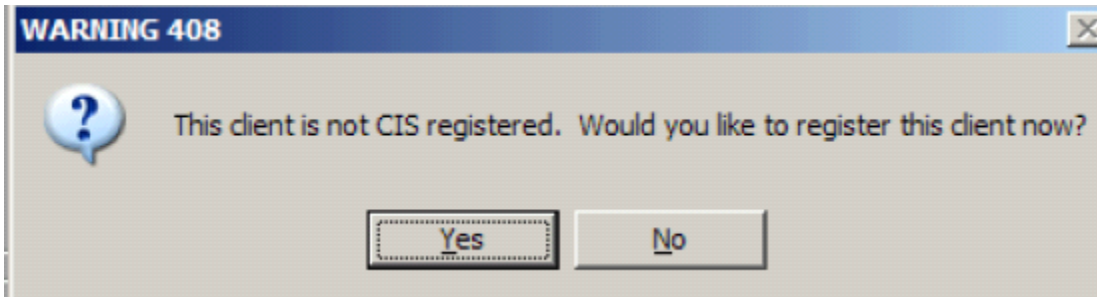
### CIS Registration Triggers

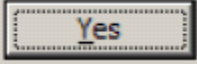
Oregon ACCESS 'forces' a CI Search when particular actions are taken. Users are navigated to a CI search in the following instances:

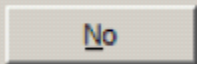
- When a user add a SSN to a person record.
- When the user attempts to enter the CA/PS system and the consumer is unregistered.
- When a user attempts to perform CMS integration and the consumer is unregistered.
- When a user changes the 'Applying For' status for the MED benefit to PA or Applying, and the consumer is unregistered.

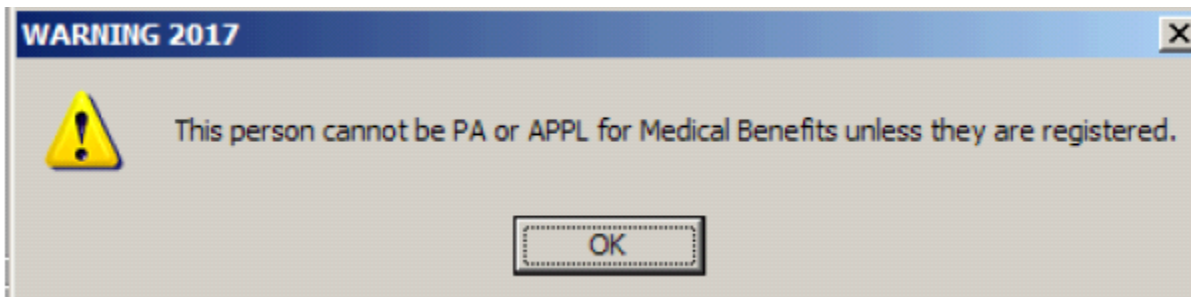
When the above actions are taken, Oregon ACCESS will return a message asking the user if they would like to register the consumer.





If the user selects  they will be navigated to the Registration screen.

If the user selects  they will receive a second message informing them that the action cannot be completed.



## Synchronization Screens

Since the Mainframe (CI) and Oregon ACCESS include two different databases that can be updated and edited individually, this can result in a mismatch of information between the two systems. In order to ensure that the person data in Oregon ACCESS is synchronized with the person data on the mainframe, the synchronization screen will be launched within the Oregon ACCESS application. This screen will display automatically if a mismatch of information is found between the Mainframe record (CI) and the Oregon ACCESS record for the same person.

<u>ACCESS</u>		<u>CIS</u>		<u>Verification</u>	
Last Name:	SPD		SPD	<input type="button" value="Report"/>	<input type="button" value="Other"/>
First Name:	NINER	<input type="checkbox"/>	NINE	<input type="checkbox"/>	
MI:		<input type="checkbox"/>	M	<input type="checkbox"/>	
DOB:	04/16/1915	<input type="checkbox"/>	05/01/1950	<input type="checkbox"/>	<input type="button" value="Report"/> <input type="button" value="Other"/>
SSN:	--		--		<input type="text"/>
DOD:	01/09/2007	<input type="checkbox"/>	00/00/0000	<input type="checkbox"/>	<input type="text"/>
Sex:	Male		Male		
Race:	White	<input type="checkbox"/>	Black or African Americ	<input type="checkbox"/>	
Ethnicity:	Not - Hispanic	<input type="checkbox"/>	Hispanic or La	<input type="checkbox"/>	

To resolve discrepancies, the user would check the box(es) next to the accurate consumer information, select a Verification type and method, then click the Synchronize button at the bottom of the screen. This will ensure that same information displays in CI as displays in Oregon ACCESS.